

VMR-VRO CHECKLIST NEW LOCATIONS

Narrative – New locations can be set up for a variety of reasons:

- A new address
- Multiple addresses
- Additional Banking Information (ACH)
- Interfaces, etc.

Guideline Reference – New Locations

Navigation: *Vendors>Vendor Setup/Maintenance>Vendor Information*

1. SetID: SHARE

Vendor Information
Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

Use Saved Search: [SHARE](#)

SetID:

Vendor ID:

Persistence:

Short Vendor Name:

Our Customer Number:

Name 1:

☐ Include History ☐ Correct History ☐ Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#) [Delete Saved Search](#)

Search Results
Only the first 300 results can be displayed. Enter more information above and search again to reduce the number of search results.

SetID	Vendor ID	Persistence	Short Vendor Name	Our Customer Number	Name 1
SHARE %	Regular	INACTIVE-003	BUSINESS		MUTTON OIL CO
SHARE %9996	Regular	INACTIVE-019	Quand		FARMERS UNION OIL BRECK
SHARE %POCHMANT	Regular	POCHMANT-004	INACTIVE		POCHMANT HEALTH
SHARE %SERE	Regular	INACTIVE-050	Quand		BERENCP DESIGNS
SHARE 0000000001	Permanent	UNICOLN-001	HRMS - STATE		LINCOLN NATIONAL LIFE
SHARE 0000000002	Permanent	PERSFLX-001	Quand		PERS FLEXCOMP, INC
SHARE 0000000002	Permanent	PERSINS-001	Quand		PERS GROUP INSURANCE, INC
SHARE 0000000004	Permanent	COLLECTCTR-001	Quand		COLLECTION CENTER INC
SHARE 0000000005	Permanent	PAULREVERE-002	Quand		PAUL REVERE LIFE INSURANCE GROUP, THE

1. Enter your search criteria.
2. Click on the selected vendor.
3. Click on the Location tab.

Summary Identifying Information Address Contacts **Location** Custom

SetID: SHARE
Vendor: 0000075488 Short Vendor Name: A & A-001 Name: A & A MOTORCOACH INC

A vendor location is a default set of rules which define how you conduct business with a vendor.

Location [Find](#) [View All](#) First [1](#) of 1 [Last](#)

'Location: ☒ Default

Description: [RTV Fees](#)

Details [Find](#) [View All](#) First [1](#) of 1 [Last](#)

'Effective Date: [RT](#)

Status:

Options: [Payables](#) [Procurement](#) [Sales/Use Tax](#) [1099](#) [Expand All](#) [Collapse All](#)

[Additional ID Numbers](#)

[Comments](#)

[Internet Address](#)

[VAT](#)

[Expand All](#) [Collapse All](#)

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- Click the plus button on the 'Vendor Location' this will create a new location.

The screenshot shows the 'Vendor Location' form. At the top, there are tabs: Summary, Identifying Information, Address, Contacts, Location (selected), and Custom. Below the tabs, the following information is displayed: SetID: SHARE, Vendor: 0000075488, Short Vendor Name: A & A-001, and Name: A & A MOTORCOACH INC. A note states: 'A vendor location is a default set of rules which define how you conduct business with a vendor.' The 'Location' section has a header bar with 'Find | View All' and 'First 1 of 1 Last'. Below this, there is a 'Location' field with the value 'REMIT' and a 'Description' field with the value 'YAKIMA,WA'. A 'Default' checkbox is checked. A plus button is located to the right of the 'Location' field. Below the 'Location' section is a 'Details' section with a header bar with 'Find | View All' and 'First 1 of 1 Last'. The 'Details' section contains an 'Effective Date' field with the value '10/04/2006' and a 'Status' dropdown menu set to 'Active'. A plus button is also located to the right of the 'Effective Date' field. An arrow points from the instruction above to the plus button in the 'Location' section.

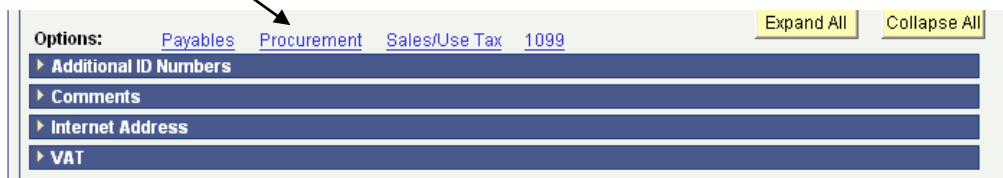
- Name the Location (remit, po, main, etc.)
- The Location description should contain:
 - The city of the address which is attached to the location.
 - If there is more than one address in the same city add the street address to the description.
- Open the Payables link.

This screenshot is identical to the one above, showing the 'Vendor Location' form. However, an arrow points from the instruction above to the 'Payables' link in the 'Options' section at the bottom of the form. The 'Options' section includes links for 'Payables', 'Procurement', 'Sales/Use Tax', and '1099'. There are also 'Expand All' and 'Collapse All' buttons.

- Select the address the appropriate address for the newly created location.
- Click Ok.

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10. Click on the 'Procurement' link.



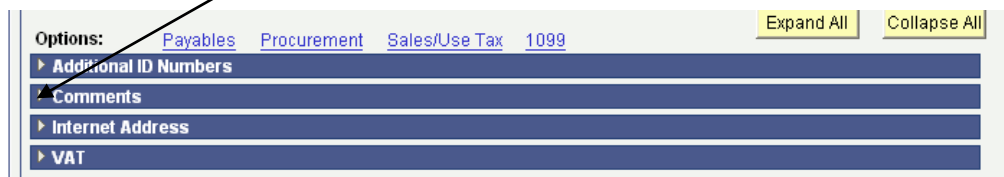
Options: [Payables](#) [Procurement](#) [Sales/Use Tax](#) [1099](#) [Expand All](#) [Collapse All](#)

- ▶ Additional ID Numbers
- ▶ Comments
- ▶ Internet Address
- ▶ VAT

11. Select the same address that was selected in the 'Payables' link.

12. Click OK.

13. Add a note in the comments indicating who and why the location was created.



Options: [Payables](#) [Procurement](#) [Sales/Use Tax](#) [1099](#) [Expand All](#) [Collapse All](#)

- ▶ Additional ID Numbers
- ▶ Comments
- ▶ Internet Address
- ▶ VAT

14. Save.